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Barolo vineyard land remained Italy’s most expensive in 2025 at 2.3 million euros per hectare

A CREA survey found average Italian farmland values rose 0.9%, with premium wine regions far outpacing the national market

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Italy’s most expensive vineyard land remained concentrated in a small group of famous wine regions in 2025, even as the broader wine business faced a weaker market and other pressures.

Preliminary findings from CREA’s Annual Survey of the Italian Land Market showed that agricultural land sales picked up again in 2025, though with wide regional differences. Average farmland values rose 0.9%, pushing the national average close to 23,000 euros, or about $24,000, per hectare. The gap between regions remained large. Average values reached 48,900 euros per hectare in northeastern Italy and fell to 8,600 euros per hectare in the islands.

Within that national picture, vineyards in some of Italy’s best-known appellations continued to command prices far above the average for farmland. According to figures reviewed by WineNews from the CREA survey, the Barolo DOCG zone in the Lower Langhe near Alba remained at the top of the market. There, vineyard land was estimated at as much as 2.3 million euros per hectare, with lower-end values starting around 350,000 euros per hectare.

The next most expensive vineyards were in South Tyrol’s DOC area around Lake Caldaro, also known as Kaltern. Maximum values there reached 1.1 million euros per hectare, while the minimum estimate was 600,000 euros per hectare. That was the highest floor price recorded among the vineyard districts cited in the survey.

Bolgheri DOC in Tuscany and Brunello di Montalcino DOCG shared the next position. In both areas, top vineyard prices were estimated at 1 million euros per hectare. Values in Bolgheri started around 300,000 euros per hectare, while vineyard land in Montalcino started around 250,000 euros per hectare.

Those areas were not only the leaders among vineyards. They also ranked among the most valuable agricultural land of any kind in Italy. The national top tier included apple orchards in Val Venosta, valued between 430,000 and 720,000 euros per hectare, and in the Adige Valley, where estimates ranged from 380,000 to 570,000 euros per hectare. Valdobbiadene vineyards devoted to Prosecco DOCG were valued between 300,000 and 550,000 euros per hectare. DOC vineyards in Lower Val Venosta and in the Isarco Valley near Bressanone were each estimated at 300,000 to 500,000 euros per hectare. Irrigated horticultural and flower-growing land in Liguria’s Albenga Plain also appeared near the top of the ranking, at 280,000 to 500,000 euros per hectare.

The survey pointed to a wider band of premium vineyard areas that still traded well above average Italian farmland values. North of Trento, vineyards largely used for Trentodoc production were estimated at 230,000 to 450,000 euros per hectare. In the Asolo Hills, another area linked closely to sparkling wine production, DOCG vineyards were valued between 300,000 and 400,000 euros per hectare.

Other strong wine districts fell below those levels but still showed significant prices. Saint-Christophe DOC vineyards in the Aosta Valley and Collina Bresciana DOC vineyards in Lombardy were both estimated at 150,000 to 300,000 euros per hectare. Chianti Classico DOCG land in the Florence area was valued between 90,000 and 210,000 euros per hectare, while the Siena side of the appellation was lower, at 90,000 to 150,000 euros per hectare.

In northern Italy, Bergamo Hills DOC vineyards were estimated at 120,000 to 200,000 euros per hectare, and Valtellina DOC land at 105,000 to 171,000 euros per hectare. Lower Piave lowland vineyards were placed at 65,000 to 150,000 euros per hectare. In Friuli-Venezia Giulia, Collio DOC vineyards, a source of some of the region’s best-known white wines, were valued between 60,000 and 140,000 euros per hectare.

CREA said the broader farmland market in 2025 was characterized by a rough balance between supply and demand, though demand had a slight edge. The number of transactions remained stable. Buyers were mostly farmers, while sellers were often landowners leaving agriculture or people who had inherited land and did not plan to cultivate it.

The survey said farm decisions were increasingly shaped by policy and by competing uses for land. CREA pointed to measures tied to the European Union’s 2023-2027 Common Agricultural Policy and to rising demand for sites suited to renewable energy projects.

The rental market was steadier than the sales market, but CREA said demand had become more selective. Lease rates were mostly unchanged, except in the most productive areas, where increases were recorded. Demand was concentrated on irrigated land, consolidated plots, parcels with good access, land that can be mechanized, and areas planted to specialized crops.

That demand, CREA said, was being driven mainly by well-capitalized farm businesses, livestock operators and agricultural contractors. At the same time, marginal land was having a harder time finding tenants. On the supply side, the closure of smaller farms and the lack of generational turnover continued to weigh on the market.

Regional differences were especially clear in the rental business. In northern Italy, demand was stronger in irrigated plains and livestock districts. In southern Italy, the market was less active and more land was available, especially in inland areas.

Looking ahead, CREA said operators in the sector did not expect major shifts in the overall balance of the land market. Still, more than 40% said they expected the amount of land coming onto the market to increase, mainly because of farm closures in marginal areas. In rentals, CREA said participants broadly expected continuity, with demand becoming even more concentrated on land with the strongest productive potential.